Northern Light Health

From the Office of Clinical Informatics

# Quick Reference Guide (QRG)
# SurgiNet - Manage Add On Cases

October 7, 2021

**This Quick Reference Guide (QRG) reviews the process of managing add on cases.**

## Common Buttons & Icons

| | |
|---|---|
| Case Manager | **Case Manager** button |
| | **Maximize** icon |
| | **New Case** icon |
| | **Magnifying Glass** icon |
| | **Minimize Window** icon |
| Retrieve | **Retrieve** button |
| | **Case Manager** icon |
| | **Cancel** icon |

## Quick Schedule a Case

From the Case Selection screen:

STEP 1: Click **Case Manager** in the toolbar at the top of the page.

STEP 2: Login using your Cerner credentials.

STEP 3: Click OK.

STEP 4: Click the Maximize icon as needed to expand the window.

STEP 5: Click the New Case icon.

STEP 6: Search for the patient using one of the identifiers in the Person Search window.

STEP 7: Click to select the correction patient in the results list.

STEP 8: Click **OK**.

STEP 9: Click the **Surgeon** field and enter the name of the surgeon.

STEP 10: Set the Priority using the Priority drop-down arrow.

STEP 11: Set the Surgical Area by using the Surgical Area drop-down arrow.

STEP 12: Set the OR location by using the OR drop-down arrow.

STEP 13: Set the Start Date.

STEP 14: Set the Start Time.

STEP 15: Set the Encounter Type by using the Encounter Type drop-down arrow.

STEP 16: Click **Add**.

STEP 17: Document the Procedure in the Surgical Procedure window.

STEP 18: Review the listed Surgeon information for accuracy.

**NOTE: If a change is needed, use the Magnifying Glass to complete a search.**

STEP 19: Set the Anesthesia Type using the Anesthesia Type drop-down arrow.

STEP 20: Set the Specialty information using the Specialty drop-down arrow.

STEP 21: Document the Duration in minutes.

STEP 22: Select the Primary Procedure check box if applicable.

STEP 23: Select any Procedure Modifiers check boxes if applicable.

STEP 24: Click **OK** in the Surgical Procedure window.

STEP 25: Click **Apply** in the Surgical Case Manager.

STEP 26: Click **OK** to close the Surgical Case Manager pop-up window.

**NOTE: Supply the family members with the case number here so that they can keep track of the case in the waiting room.**

## View Added Case Information in Case Selection

From the Surgical Case Manager window:

STEP 1: Click the **Minimize** icon for the Surgical Case Manager window if needed.

STEP 2: Sort cases based on available Select by options as appropriate.

STEP 3: Set search filters as appropriate for your Select by option.

STEP 4: Click **Retrieve**.

**NOTE: Results populate with the new cases at the top.**

## Cancel an Add-On Case

From the Case Selection screen already logged into Case Management:

STEP 1: Click the **Case Management** icon in the lower left of the screen.

**NOTE: This icon only appears if you are already logged into Case Management.**

STEP 1: Click the **Minimize** icon for the **Surgical Case Manager** window if needed.

STEP 2: Click the **Cancel** icon.

STEP 3: Search for the case you want to cancel.

**NOTE: To search set the Criteria and Select by filters; then click Retrieve.**

STEP 4: Click the case you want to cancel from the results.

STEP 5: Click **OK**.

STEP 6: Document the surgeon performing the procedure.

**NOTE: If needed, search for a provider using the Magnifying Glass icon.**

STEP 7: Document who requested the cancellation.

STEP 8: Set a cancellation reason using the **Cancellation Reason** drop-down arrow.

STEP 9 Click **OK** in the Cancel Case window.

STEP 10: Click **OK** to acknowledge the Successful Case Cancellation window.